To: Theresa Mungioli <mungiolit@rochesterhills.org>
Cc: Joe Snyder <snyderj@rochesterhills.org>, Leanne Scott <scottl@rochesterhills.org>

Hi Theresa,

It's funny because Joe and I were just saying I haven't seen any questions come through, did you get any? We checked our email and had your questions :) Which I am glad you asked, and happy to try and clarify a little better. I hope this helps, and if not, please feel free to let me know of any additional questions you may have.

Joe - could you add more clarity to question #4. I tried to catch up with you to collaborate, but I know you are in a meeting and may not be out before the end of the day and I wanted to make sure I could get this to Theresa, sooner rather than later.

1. How does moving to PLM software impact staff levels? When I hear "automate our internal procurement process" I think of staffing.

Moving to this PLM software is not going to impact our staffing levels and we will still need to maintain our current team. The workload and amount of solicitations and processes we have to work through will remain unchanged. Instead, this software solution is designed to significantly improve our workflow and create standardization with documents. Currently, our processes are fragmented, with documentation scattered across various systems, which hinders our ability to collaborate internally, and allow buyers to be efficient in their efforts because we have a process that relies heavily on email exchanges with multiple versions and it creates challenges in maintaining a clear audit trail and version tracking. This goes with our contracts too when negotiating terms and conditions of a contract with a vendor. It is all a manual email process and can go back and forth with multiple versions and input from multiple individuals and this is all done on a Word document through track changes.   This manual approach increases the potential for errors and necessitates time-consuming reviews to ensure accuracy. Additionally, we lack standardized templates and contracts, requiring us to reformat each solicitation almost from scratch. The new system will provide a library of templates, allow us to create our own, and streamline document creation. It will also enable electronic evaluations, allowing evaluators to log comments directly, eliminating the need for paper packets and email submissions. This shift to an automated system will streamline processes and allow our professional staff to dedicate more of their expertise to consultation rather than administrative tasks. Ultimately, our goal with this PLM system is to improve our lead times, which are currently extended due to manual processes. By freeing up our team from repetitive paperwork, we aim to enhance efficiency and improve the service we provide to our end-user departments, empowering them staff to focus on more strategic initiatives.

2. Automating the evaluation process - I am doing this now with the RARA Master Plan bid. How would that process change? I don't mind taking the time to review the bids, as it helps me understand the work. However I realize you are doing this on a larger scale and must be very time consuming.

Extremely time consuming :) You see how with this RARA evaluation, it involves receiving documents via email, shared links, or even paper, the new PLM system will streamline this significantly for you and other evaluators. Instead of managing multiple documents, navigating different documents/platforms, the evaluation process will move online. An evaluator would receive a notification to log into the system, where all the necessary proposal information and a clear, structured format for entering feedback directly within the system would occur. This means no more searching through email threads, or dealing with various files, attachments, or papers. Additionally, the system will guide an evaluator through the evaluation criteria, making it easier to provide consistent and comprehensive reviews. On the purchasing side, the benefit of tracking evaluation progress becomes more efficient, as now we can see progress real-time in the system, versus that of sending out emails to evaluators to see how things are going and can we meet soon to discuss the proposals. The goal of this is to allow the evaluator to have a more organized, accessible and ultimately less time consuming way to contribute to the evaluation process.

3. How would this track vendor performance? And would it allow for cross organization feedback? Ex. - RARA uses a vendor and they don't perform as expected. Would this review be in the system to provide feedback on future use of the vendor?

Purchasing as part of implementing this system, will implement a formal Vendor Performance Policy where departments will regularly provide feedback on vendors based on predefined criteria. We will look at it as a regular "report" card for our vendors. This will help us build a clear record of their performance over time and will allocate a "grade" to them. Related to the point about cross-organizational feedback, the goal is for the system to capture performance data that can inform future vendor selections across the entire organization. WHile I'm not specifically sure how it could work in that direct manner for RARA, it is certainly something we can explore with SOVRA and possibly input, it just may require some initial setup. Maybe we could possibly upload key contracts and then have them provide vendor performance scoring within the system.   We could also provide feedback to RARA based on vendor performance data we hold, should there be any vendor's RARA is interested in and we can check the system and always provide them

performance feedback. I am definitely excited about the opportunity to finally have the ability to create a centralized tracking area for vendor performance so that the City as a whole can make more informed decisions and ensure we are working with the most reliable vendors.

4. Modernizing contract management - would this help with billing and budget amendments? We are usually 1 year behind in finishing the accounting for the final expense. Would this expedite the process? From a contract management side of things, how it will help modernize that is related to what I indicated above with creation of contracts, and then departments having access to the contracts electronically and being able to utilize the system for contract management. Currently we have to email contracts to the end users, so everyone has copies of contracts everywhere and how we maintain where the "true" contract is is by what is held in the vault in Clerks, or that Purchasing has in the file. With this system, the contract will now be housed in this system and end users will have access to them on the system, as well as Accounting and other departments. As to if this will help billing and budget amendments, I'll let Joe speak more to that, as I am not familiar with how that process works for Fiscal.

5. I have used DocuSign in the past and find them to be reliable and easy to use.
This is really good feedback to hear as we were really going back and forth which platform we should use.

On Mon, May 12, 2025 at 3:05 PM Theresa Mungioli <mungiolit@rochesterhills.org> wrote:
Lisa and Joe,

I am apologize for sending questions late and do not expect an answer before the meeting tonight.

- How does moving to PLM software impact staff levels? When I hear "automate our internal procurement process" I think of staffing.
- Automating the evaluation process - I am doing this now with the RARA Master Plan bid. How would that process change? I don't mind taking the time to review the bids, as it helps me understand the work. However I realize you are doing this on a larger scale and must be very time consuming.
- How would this track vendor performance? And would it allow for cross organization feedback? Ex. - RARA uses a vendor and they don't perform as expected. Would this review be in the system to provide feedback on future use of the vendor?
- Modernizing contract management - would this help with billing and budget amendments? We are usually 1 year behind in finishing the accounting for the final expense. Would this expedite the process?
- I have used DocuSign in the past and find them to be reliable and easy to use.

Thanks for bringing this forward and the kudos you shared about MIS. I look forward to the conversation tonight.

Theresa Mungioli